

**INCOME**

W2's - Wages, Salary Income  
 1099 Int/Div - Interest & Dividend Income  
 1099R - IRA/Pension Income  
 1099B - Investments Sold  
 1099-S - Property Sold (residence, home, land, etc)  
 1099SSA - Social Security Income

**OTHER**

Alimony Received  
 1098T -Scholarship (Grants)  
 1099G - Unemployment Compensation  
 Payments from Prior Installment Sale  
 Jury Duty  
 Prizes, Bonuses, Awards, Gambling, Lottery  
 Worker's Compensation  
 Other

**COVID-19**

Did you receive a PPP Loan? Amount?  
 Did you receive an EIDL Loan? Amount?  
 Did you receive any state grants? Amount?  
 Economic Stimulus Payments - Amounts?  
 Self Employed and missed work due to COVID ?  
 Self Employed and missed work due to having school/daycare closed?  
 If yes to either SE of above, please provide dates and documentation.  
 Did you pay employees Covid sick/family pay?  
 Did you get a working capital grant/loan?

**EXPENSES**

Medical/Dental Expenses (not paid by Health Savings Account)  
 Taxes Paid (RE Tax, Personal Property Tax)  
 1098 - Mortgage Interest/Mortgage Insurance  
 Investment Interest  
 Casualty/Theft Losses (storm, water, fire, accident, or stolen)  
 Charitable Contributions (need written receipt of any amount over \$250)  
 Child & Other Dependent Care expenses  
 (Need name, address, & SS# or EIN, & amount Paid)  
 Job Related Moving Expenses  
 Alimony Paid (amount, Persons SS#)  
 1098-E Student Loan Interest Paid  
 Health Savings Account Contributions  
 Health Savings Account withdrawals  
 Medical Savings Account Contributions  
 Traditional/Roth IRA Contributions  
 529 Contribution  
 College Education Expenses  
 Educator Expenses  
 Any Estimated Tax payments made to IRS or State  
 1095A - Health Insurance Marketplace Statement  
 1095B/C - Employer Health Insurance Proof of Coverage  
 1098T- Tuition Expense

**Questions - if yes, please provide documentation**

Did you receive rent from Real estate or other property? Provide income/expenses  
 Did you receive income from gravel, timber, minerals oil, gas, copyrights, patents?  
 Do you have a foreign bank account, trust, or business?  
 Do you provide a home for or help support anyone that is not a dependent?  
 Did you receive any correspondence from the IRS or State Revenue Department? Please provide  
 Were there any births, deaths, marriages, divorces or adoptions in your immediate family?  
 Did you give a gift of more than \$15,000 to one or more individuals?  
 Did you have any debts cancelled, forgiven, or refinanced?  
 Did you go through bankruptcy proceedings?  
 Did you pay interest on a student loan for yourself, your spouse, or dependent? Provide 1099  
 Did you pay for yourself, spouse, or dependent to attend classes beyond high school? Provide 1098T  
 Did you have any children under the age of 19 or 19 to 23 year old students with unearned income of more than \$1,100?  
 Did you purchase a new alternative technology vehicle or electric vehicle?  
 Did you install any energy property in your residence such as solar water heaters, generators, or fuel cells or energy efficient improvements such as exterior doors or windows, insulation, heat pumps, furnaces, central air conditioners or water heats? If yes, provide receipts & descriptions.  
 Did you own or have control over any Virtual Currency?  
 Did you Receive an Identity Theft Protection Pin (Please provide)  
 Did you donate through a QCD directly to a charity?